

Online Expense Portal

QUICK REFERENCE GUIDE

EDUCATIONAL THERAPIES & SERVICES

The screenshot shows a web form titled "EDUCATIONAL THERAPIES & SERVICES". The form contains the following fields and controls:

- Payment Date:** A text input field with a date format placeholder "MM/DD/YYYY".
- Payment Method:** A dropdown menu with the text "Select Payment Method".
- Vendor / Facility:** A text input field.
- Payment Total:** A text input field with the value "0.00".
- Receipt File:** A text input field with a "Browse..." button.
- Therapist:** A text input field.
- Therapy Type:** A dropdown menu with the text "Select one".
- Applicant Has Verified The Credentials:** A checkbox.
- Educational Therapy Credential Type:** A dropdown menu with the text "Select one".
- Buttons:** "Save", "Cancel", and "Back".

A dropdown menu for "Therapy Type" is open, showing a list of services:

- Select one
- Applied Behavior Analysis
- Aquatic Therapy
- Art Therapy
- Equine Therapy
- Gymnastics Therapy
- Hand Therapy
- Hippotherapy
- Martial Arts Therapy
- Music Therapy
- Occupational Therapy
- Physical Therapy
- Recreational Therapy
- Relationship Development Intervention (RDI) Therapy
- Social Group Therapy
- Speech Therapy
- Therapeutic Riding
- Verbal Behavior Analysis
- Vision Therapy
- Other

Numbered arrows indicate the sequence of steps:

- 1) Enter the following information: Payment Date, Payment Method, Vendor / Facility, Payment Total, Receipt File, Therapist.
- 2) Select a Therapy Type from the drop-down menu.
- 3) Confirm that you have reviewed the therapist's credentials (checkbox).
- 4) Select an Educational Therapy Credential Type from the drop-down menu.
- 5) Click Save to proceed.

1) Enter the following information:

- **Payment Date:** Select a date from the calendar, or type the date directly into the textbox
- **Payment Method:** How the card was used
- **Vendor/Facility:** Most likely the name of the service
- **Payment Total:** The amount of the transaction, as shown on the receipt
- **Receipt File:** Please note files cannot exceed 100MB and file names cannot include symbols (" \$ # < > /)
- **Therapist:** First and last name of the therapist

2) Select a **Therapy Type** from the drop-down menu

- If the therapy is not listed on the menu, select **Other**
 - When **Other** is selected, an additional field is visible for typing the name of the therapy

3) Confirm that you have reviewed the therapist's credentials (you will be prompted to upload the credentials once the information on this screen is saved)


4) Select an **Educational Therapy Credential Type** from the drop-down menu

- Items in this menu are determined based on the **Therapy Type** chosen above
- If the credential type is not listed on the menu, select **Other**
 - When **Other** is selected, an additional field is visible for typing the name of the credential

5) Click **Save** to proceed

UPLOAD CREDENTIAL

Educational Therapy Credential for Therapist Name

Credential  **6**

Credential File

7

- 6) Click **Browse** to upload a picture or electronic copy of the therapist's credential
 - This button will read, **Choose Files**, for Chrome users
 - Previously-uploaded credentials populate in the **Credential** drop-down menu so that they can be selected in future expense reports
- 7) Click **Save** to save the expense entry and return to the Main Screen, where you can create additional expense entries, submit your expense report, or later modify this entry prior to submission.

Note: A new expense entry is required for each payment.